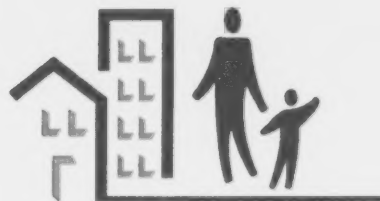


# **SERVICE DELIVERY PLAN**

**April 1, 2010 – March 31, 2013**



PUBLIC GUARDIAN  
AND TRUSTEE OF  
BRITISH COLUMBIA

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TRANSMITTAL AND APPROVAL LETTERS

**Transmittal and Approval Letters**

To: The Honourable Michael de Jong, Q.C.  
Attorney General

Pursuant to s. 22 (1) of the *Public Guardian and Trustee Act*, I have the honour of delivering the Service Delivery Plan for the Public Guardian and Trustee of British Columbia.

This plan covers the period April 1, 2010 to March 31, 2013. The plan was prepared under my direction and all material fiscal assumptions and policy decisions as of April 10, 2010 have been considered in preparing it. I am accountable for the basis on which the plan has been prepared.



Public Guardian and Trustee of British Columbia



Date

To: Jay Chalke, Q.C.  
Public Guardian and Trustee

Pursuant to s. 22 (3) of the *Public Guardian and Trustee Act*, I approve the Service Delivery Plan 2010 – 2013 for the Public Guardian and Trustee of British Columbia.

\_\_\_\_\_  
Attorney General

\_\_\_\_\_  
Date

Pursuant to s. 22 (3) of the *Public Guardian and Trustee Act*, the attached Service Delivery Plan 2010 – 2013 for the Public Guardian and Trustee of British Columbia has been approved by the Treasury Board.

\_\_\_\_\_  
Chair of Treasury Board

\_\_\_\_\_  
Date

**Message from the Public Guardian and Trustee**

I am pleased to present the Service Delivery Plan of the Public Guardian and Trustee (PGT) for April 1, 2010 through March 31, 2013.

We move into this period with considerable uncertainty on a number of fronts.

Proclamation of the long awaited legislative package regarding adult guardianship law reform has been deferred because of the economic situation. While I am buoyed that the provincial government has advised that it remains committed to the new law, the timing is uncertain and British Columbians continue under an archaic legal regime in this area. British Columbia, once a Canadian leader, now lags behind almost all other Canadian jurisdictions with respect to court and statutory guardianship laws. For example, this past year Alberta brought into force their modernized adult guardianship law.

In the interim, the recent statutory amendment that allows for the adult guardianship law reform package to come into effect in phases represents some progress. I look forward to the provisions providing increased safeguards in enduring powers of attorney being brought into force in the near future as part of this phased implementation.

There are numerous other statutory changes that will impact the PGT during the term of this service delivery plan, most significantly the *Wills, Estates and Succession Act* which will thoroughly revise estate law in British Columbia. Preparing for these and other legislative changes will require extensive planning by the PGT with associated one time and ongoing costs that are currently unfunded.

Recognition of PGT responsibilities with respect to children and youth continues to grow, with particular attention to our role as guardian of estate for children in continuing care. I am pleased that our prudent investment strategies have buffered child and youth clients with trust funds, as well as our other clients, from suffering undue negative impact during the recent worldwide economic downturn.

Fiscal challenges associated with managing client assets are also evolving with the changing client profile of PGT adult clients. Adult clients are coming to the PGT later in life and for shorter periods of time than in the past. Furthermore the PGT is increasingly called on to investigate concerns of abuse, neglect and self neglect, among other impacts this change in client profile adds to the urgency of reviewing the PGT fiscal model, an activity that will be occurring during the term of this service delivery plan.

During this period, the PGT will also continue its emphasis on protecting client assets through strengthened internal controls and other measures to respond effectively to the continuously evolving risk environment. Through prudent stewardship of client assets, I remain committed to continuing to earn the trust that PGT clients and the public have in our organization.

I am pleased to note that PGT services remain aligned with British Columbia's strategic direction set out in Great Goal Number Three, to build the best system of support in Canada for persons with disabilities, special needs, children at risk and seniors.



Jay Chalke, Q.C.  
Public Guardian and Trustee

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## 1. OVERVIEW OF THE CORPORATION

### What is the Public Guardian and Trustee

The Public Guardian and Trustee (PGT) serves the most vulnerable British Columbians by providing and/or monitoring substitute financial, legal and personal decision making on their behalf. The majority of its clients are children (including those in continuing care of the Province), and adults whose mental incapacity makes them vulnerable to abuse, neglect and self neglect. The PGT also administers estates of deceased persons and provides personal trust services. PGT responsibilities span the legal, financial, health and social services sectors.

#### A. Governance

The organization is a corporation sole established under the *Public Guardian and Trustee Act*. Authority is vested in the Public Guardian and Trustee who is appointed by the Lieutenant Governor in Council for a fixed six year term (renewable once) to ensure independence. The current office holder is Jay Chalke, Q.C., who was reappointed February 28, 2006. Staff act under authority delegated by the PGT.

As a fiduciary, the PGT is independent of government in its case related decision making responsibilities. By statute, the PGT exercises quasi judicial authority in certain situations. The PGT reports to the Legislative Assembly through the Attorney General.

An Investment Advisory Committee of independent senior financial advisors is established by statute to monitor PGT investment performance and advise on strategic investment policy. An Audit Advisory Committee has been established to advise the PGT on risk management and other audit considerations. An Executive Committee comprised of Directors, the Deputy Public Guardian and Trustee and the Public Guardian and Trustee manages the organization.

In 2009/10, the PGT provided services through 234 funded employee positions to approximately 33,000 clients and managed \$789 million of client trust assets. The PGT delivers service from headquarters in Vancouver, offices in Victoria and Kelowna, part time offices at Riverview Hospital and Broadway Youth Resource Centre and a warehouse.

The PGT is organized into three broad operational program areas: Child and Youth Services, Services to Adults, and Estate and Personal Trust Services. These programs work with Client Finance and Administrative Services, Legal Services, and Policy, Planning and Public Education. The Executive Office provides overall direction and coordination.

Under the *Public Guardian and Trustee Act*, the PGT is subject to stringent public performance accountability provisions. In addition to statutory requirements for annual independent financial audits of both its trust funds and its operating funds, the PGT is required to have an independent audit of its annual performance report. These accountability provisions reflect the inability of most PGT clients to effectively monitor service quality or seek alternate service providers and thus this statutory transparency is a surrogate for consumer choice.

### Key Statutes

Numerous acts set out the powers and duties of the PGT. Key provincial statutes include:

- *Adult Guardianship Act*
- *Child, Family and Community Service Act*
- *Community Care and Assisted Living Act*
- *Cremation, Interment and Funeral Services Act*
- *Employment Standards Act*
- *Estate Administration Act*
- *Estates of Missing Persons Act*
- *Family Relations Act*
- *Health Care (Consent) and Care Facility (Admission) Act*
- *Infants Act*
- *Insurance Act*
- *Insurance (Vehicle) Act*
- *Patients Property Act*
- *Power of Attorney Act*
- *Public Guardian and Trustee Act*
- *Representation Agreement Act*
- *Trustee Act*
- *Trust and Settlement Variation Act*
- *Wills Variation Act*

### B. Financing Structure

PGT expenditures are paid from a special account established by the *Public Guardian and Trustee Act* in the Consolidated Revenue Fund. Revenue flowing into the special account is derived from a combination of fees and commissions charged on client assets and income and voted funding from the government of British Columbia for services where fees would be impractical, inappropriate or insufficient. Fees and commissions account for the majority of the PGT funding. Revenue in excess of approved expenditures is retained in the special account if unspent at year end.

In 2008/09, PGT **estate and trust services** accounted for 65% of total costs while producing 90% of self generated revenue. While the proportion of costs has been declining for estate and trust services, the proportion of revenue generated has remained relatively constant.

In 2008/09, PGT **public services** accounted for 35% of total costs while generating only 10% of self generated revenue. PGT investigatory and regulatory responsibilities continue to grow but are seldom revenue generating due to the nature of the activity.

All PGT fees and commissions are established by the Lieutenant Governor in Council and set out in the *Public Guardian and Trustee Fees Regulation* (BC Reg. 312/2000) as amended.

PGT fees and commissions are a combination of commission on income, commission on capital and asset management fees. In addition, the PGT charges certain hourly and fixed cost service fees. Third party charges for client related services are charged directly to clients.

## OVERVIEW OF THE CORPORATION

<b>PGT Primary Client Groups</b>	<b>Key PGT External Relationships</b>	<b>Key PGT Private Sector Relationships</b>
<p>Almost all PGT clients are identified in BC's Great Goal Number Three: <i>Build the best system of support in Canada for persons with disabilities, special needs, children at risk and seniors.</i></p> <ul style="list-style-type: none"> <li>• Children in continuing care of the Province or without legal guardians.</li> <li>• Children whose guardians wish to settle a claim for damages on behalf of their children.</li> <li>• Children with trust funds</li> <li>• Children who have no litigation guardian</li> <li>• Seniors who require assistance with decision making</li> <li>• Adults with developmental disabilities</li> <li>• Adults with serious mental disorders or mental illness</li> <li>• Incapable adults without family who require health care decisions</li> <li>• Vulnerable adults experiencing abuse, neglect or self neglect</li> <li>• Adults with acquired brain injuries</li> <li>• Heirs and beneficiaries of estates of deceased and missing persons</li> <li>• Beneficiaries of personal trusts</li> </ul>	<p>Clients are at the core of all PGT activity. The PGT interacts with and/or works in partnership with a broad range of individuals and organizations in helping to meet client needs.</p> <ul style="list-style-type: none"> <li>• Family and friends of clients</li> <li>• Community groups</li> <li>• Government of BC, e.g., Ministries of Children and Family Development, Housing and Social Development, Attorney General, and Health.</li> <li>• Public service partners with statutory authority, e.g., Representative for Children and Youth, Community Living BC, Assisted Living Registrar, and Health Authorities</li> <li>• Aboriginal child and family services</li> <li>• Insurance Corporation of BC.</li> <li>• BC Investment Management Corporation</li> <li>• Government of Canada, e.g., Indian and Northern Affairs Canada, Canada Revenue Agency, Department of Veterans Affairs</li> <li>• Court of Appeal, Supreme Court and Provincial Court of British Columbia where interests of parties under disability are at issue</li> <li>• BC Unclaimed Property Society</li> </ul>	<p>The PGT works with a wide range of private sector service providers in meeting its responsibilities for protecting client financial, legal, and personal interests.</p> <ul style="list-style-type: none"> <li>• Private service providers, e.g., care facilities, funeral homes, personal attendants</li> <li>• Personal service providers</li> <li>• Financial institutions, e.g., banking, investment services, private investment managers.</li> <li>• Law firms.</li> <li>• Chartered accountants</li> <li>• Insurance providers.</li> <li>• Heir tracers.</li> <li>• Real property managers</li> </ul>

## PRIMARY LINES OF BUSINESS

### **2. PRIMARY LINES OF BUSINESS**

The PGT is responsible for making substitute decisions on behalf of British Columbians who require assistance and/or protection because of a legal disability. In certain instances, the PGT is also responsible for playing a limited oversight role of third party substitute decision making.

People become PGT clients usually through legislation, court order, trust deed or referral. In addition, some choose the PGT as their service provider for personal trusts or estate administration. In meeting its responsibilities, PGT daily operations are centred around the following primary lines of business.

#### **A. Protecting people under legal disability by reviewing decisions made by others**

Under British Columbia law, the PGT screens, investigates, monitors, takes protective measures and otherwise intervenes on behalf of persons under legal disability or who may be at risk because of abuse, neglect or self neglect. The PGT acts to ensure that the legal and property interests of clients are protected. To accomplish this, the PGT reviews a range of applications in legal proceedings, investigates allegations, reviews accounts of private committees and appoints Designated Agencies to investigate and respond to possible abuse, neglect or self neglect of adults.

Activities may include providing comments to the Supreme Court of British Columbia, reviewing proposed litigation settlements, reviewing proposals to transfer child guardianship, freezing accounts, applying to court to remove authority from third parties and taking legal action.

#### **B. Administering property of clients**

The PGT is bound by fiduciary obligations to protect and administer property on behalf of clients. The PGT ensures that client needs are met, client property is protected, clients are enabled to access services and client wishes are met to the extent possible. To accomplish this, the PGT secures, manages and disposes of assets.

This may include physically securing property, determining and collecting income, paying bills, administering personal trusts, investing as a prudent investor, making disbursements for the benefit of clients and distributing trust accounts. In planning and implementing these activities, the PGT seeks to understand the client's context and exercises professional discretion in making quality decisions.

#### **C. Administering estates of deceased and missing persons**

The PGT may act as executor or administrator of the estates of deceased persons. As Official Administrator of British Columbia, the PGT administers estates of persons who have died and no one is willing or able to administer their estates or when the whereabouts of executors, beneficiaries and heirs are not known. The PGT also acts as curator of the estates of missing persons. These activities are intended to ensure efficient, orderly intergenerational transfer of wealth, reduced litigation and increased certainty for property obligations upon death.

## PRIMARY LINES OF BUSINESS

To accomplish this, the PGT arranges funerals, traces heirs, submits tax returns and distributes estates. This may include applying for legal authority, collecting and paying debts, documenting heirs, and liquidating and distributing assets.

### **D. Making personal and health care decisions**

The PGT makes or appoints other substitute decision makers to make health care decisions on behalf of persons who are mentally incapable and thus unable to provide consent to treatment and who are without a supportive network. The PGT may also be appointed by the court to make other personal care decisions on behalf of incapable adults. This is intended to ensure that client health and safety are protected, client well being is promoted, and legal rights of autonomy are respected.

To accomplish this, the PGT arranges client access to services and shelter and makes or participates in client decision making. This may include reviewing client needs, wishes, values and interests, and developing individualized care plans. In carrying out these responsibilities, the PGT makes decisions based on client needs, wishes, values and interests.

### **E. Educating the public**

The PGT recognizes the importance of providing public information and education to mitigate the growth in demand for PGT services, facilitate cooperation with service partners and stakeholders and to inform the public about related issues. These activities help professionals to properly apply the law, assist service partners in understanding their responsibilities, encourage appropriate utilization of PGT services, deter financial abuse of incapable and vulnerable persons, and limit growth in demand for PGT services through encouraging responsible private personal planning for incapacity and death.

To accomplish this, the PGT communicates with clients, service partners, key stakeholders and the public. This may include producing publications, making presentations, providing news releases or enhancing internet presence. In its public awareness activities, the PGT seeks to ensure that intended audiences are aware of their obligations and rights and become more aware of the PGT and its responsibilities. The PGT has very limited resources for these activities and must balance speaking invitations, requests for materials and other related needs with its capacity to respond.

### **F. Applying our special expertise to advocate for our clients**

The PGT supports clients in accessing services and exercising their civil, personal and property rights. This activity requires considerable liaison with service providers and increasingly may include legal action to pursue client rights and entitlements. At a systemic level, the PGT advocates for improved laws, policy and regulations in its responsibility areas.

This may include applying the special expertise of the PGT in analyzing emerging issues and making recommendations regarding policy and legislation to ensure that decision makers are aware of the impact of legislative changes so that when laws and policies in BC are developed, the interests of persons under legal disability are taken into account.

### 3. STRATEGIC CONTEXT

#### **Vision**

Rights, choices and security for all British Columbians.

#### **Mission**

To safeguard and uphold the legal and financial interests of children; to manage the legal, financial and personal care interests of adults needing assistance in decision making; and to administer the estates of deceased and missing persons.

#### **A. Values**

**Integrity:** As a fiduciary, the PGT and staff act in accordance with the highest ethical, legal and personal standards.

**Client centred service:** Clients are the focus of PGT services and PGT staff constantly strive to provide quality customer service.

**Openness:** Annual statutory public reporting on all aspects of PGT performance ensures accountability and transparency to clients, government and the public.

**Respect:** We treat clients, family and friends in a courteous, respectful manner.

**Teamwork:** PGT staff work with one another and with service partners in striving for seamless service delivery.

**Staff support:** Staff members are acknowledged to be the greatest resource of the PGT and are recognized and appreciated for their expertise and professionalism.

**Innovation:** PGT staff are encouraged to be alert to new and better ways of delivering service and helping clients.

#### **B. Factors impacting the PGT**

A wide range of factors are expected to affect the business of the PGT over the coming three years.

- Demographic changes continue to be a major driver in increasing demand for PGT services, particularly in the area of services to seniors with dementia and other diseases of aging, and also with respect to implications of serving a diverse and mobile population with assets and family members throughout Canada and the world.
- Growing awareness of the incidence and varieties of elder abuse and abuse of other incapable adults continues to increase pressure to take preventive measures and facilitate community response.

## STRATEGIC CONTEXT

- The long term transition is continuing from the PGT acting primarily as a fiduciary providing direct financial management service to clients to a role that includes significant investigatory and regulatory responsibilities without corresponding revenue from fees and commissions.
- Constraints associated with PGT infrastructure and capacity, will continue to pose enterprise risks and impair service delivery until upgraded.
- New accountability pressures and demands associated with public, client, stakeholder and service partner expectations about the nature, quality and service delivery models for PGT services continue to grow and evolve.
- Demand to provide legal services on behalf of clients as part of meeting PGT fiduciary obligations continues to grow, including individual litigation, and increasingly, class actions which may involve a legal obligation to incur costs without offsetting revenue.
- PGT responsibility areas such as children in care, seniors and persons with disabilities, continue to attract significant public attention.
- Ongoing changes in the availability of community supports for individuals, coupled with growth in the number of agencies with statutory authority, has made the service environment for PGT clients far more complex and has made supporting PGT clients much more challenging.
- Pressures associated with providing services to Aboriginal clients and First Nations communities continue to grow, particularly that of providing guardianship services to Aboriginal children in continuing care which requires the PGT to develop and maintain relationships with growing numbers of Delegated Aboriginal Agencies.
- The PGT faces new service demands from First Nations associated with withdrawal of Indian and Northern Affairs Canada services and other changes associated with treaty implementation resulting in federal off loading.
- Recruiting and maintaining qualified staff continues as a significant challenge.

### C. Strategic Directions

Change will continue as a major element of PGT activities during the period covered by this service delivery plan. This includes both change that will position the PGT to provide new statutory duties and change that will position the organization to meet current standards required of a fiduciary.

The PGT is the Official Administrator of British Columbia and will be significantly impacted by the new *Wills, Estates and Succession Act* passed in the 2009 Legislative Session (Bill 4). This legislation is an extensive revision of British Columbia estate law and will require a comprehensive implementation plan to protect and serve clients and meet new and revised statutory duties.

Phased implementation of the *Adult Guardianship and Planning Statutes Amendment Act 2007*, beginning with the incapacity planning sections, will also involve planning and implementation

## STRATEGIC CONTEXT

activities, as will a recent amendment to the *Public Guardian and Trustee Act* to allow the PGT to act as trustee by consent.

The continued and accelerated devolution of child protection responsibilities to Delegated Aboriginal Agencies also places significant demands on the PGT. As guardian of estate for children in continuing care, the PGT was historically coguardian only with the Ministry of Children and Family Development. It is now coguardian with 20 additional agencies and must develop and maintain partner relationships with each of these. This new environment poses significant challenges to a small organization such as the PGT, which has limited infrastructure and capacity for this type of relationship building and maintenance.

During the first year of this service delivery plan, the PGT will make enhancement of its financial controls a primary focus. Diagnostic and remediation reviews have identified areas requiring strengthening to better protect client assets in today's evolving risk environment.

The PGT has embarked on a continuous improvement program to improve controls and effectiveness overall. While some of this upgrading will be addressed during year one of this plan, activities will be continuing through years two and three. Monitoring and responding to evolving risk points is a continuing obligation for a fiduciary such as the PGT with \$789 million in client assets under administration.

### 4. FINANCIAL CONTEXT

- Schedules have been prepared on the basis of information available to the Public Guardian and Trustee (PGT) as of March 2, 2010. Although not expected, any changes that may occur after that date are not included.
- Amounts are stated in 2009/10 dollars.
- Revenue and expenditures are in agreement with Treasury Board and Ministry targets and represent status quo operations.
- PGT voted funding is provided in accordance with amounts established by the Ministry of Attorney General in its 3-year Service Delivery Plan.
- Building Occupancy costs and Workplace Technology Services have been transferred back to Shared Services of BC effective April 1, 2010. Voted funding was reduced by \$1.609m in 2010/11 and \$1.612m in 2011/12 and onwards to reflect this transfer.
- The PGT base FTEs of 234 are increased by 12 in 2010/11 and by a further 3 in 2011/12 and onwards to a total of 246 and 249 respectively. The additional FTE's were provided for the implementation of strengthened governance, compliance and control measures and are unfunded.
- Expenditure realignments have been made in staffing, professional services and other operating expenses in order to maintain status quo service delivery on base operations.
- Benefits have been included at 24.5% of salaries (including leave liability) throughout the period.

## STRATEGIC CONTEXT

- Leave liability amounts have been calculated as 0.786% of salaries for 2010/11 through 2012/13.
- BCGEU Master and Component Agreements expired at midnight, March 31, 2010. Indications are at this time that the new 2 year collective agreement will not result in any additional costs for PGT. It is anticipated, that should it be required, funding to offset the costs of any future agreements impacting GEU and management will be forthcoming through a global adjustment inclusive of the PGT. Accordingly, costs for salaries and benefits for GEU and excluded staff were calculated at status quo with 2009/10 levels for fiscals 2010/11 through 2012/13.
- Changes arising from the renewal of the collective agreement between the Province and the BC Crown Counsel Association have been included. The continued agreement has a 12 year term commencing April 1, 2007 and expiring March 31, 2019. The incremental percentage for 2010/11 is 3.77%. A further base increment of 1.27% is scheduled for 2011/12 ongoing to 2019 in addition to percentage compensation parity with the Provincial Court judiciary. Any known amounts are included in the PGT salary projections and estimates of costs for 2011/12 and 2012/13 have been included at 1.27% increase each fiscal.
- Base capital funding of \$0.500M has been included in 2010/11 through 2011/12, and funding is assumed to continue at the same level in 2012/13.
- Financial impact of various acts that have been passed by the legislature but not yet brought into force (i.e. Wills, Estates and Succession Act, 2009; Adult Guardianship and Planning Statutes Amendment Act, 2007; Health Statutes Amendment Act, 2007) are not included due to timing uncertainty.

# STRATEGIC GOALS, OBJECTIVES, STRATEGIES AND PERFORMANCE MEASURES

## 5. PERFORMANCE MEASURES

Goal #1: PROPERTY AND FINANCIAL INTERESTS OF PGT CLIENTS WILL BE WELL MANAGED.						
Objectives		Performance Measures		Targets		
			08/09 Actual	09/10 Target	2010/11	2011/12 2012/13
1.1 Disbursements from children's trusts will be made in a timely manner.	1.1.1	Percentage of disbursements from children's trusts completed within 15 calendar days of request by the guardian or client	94%	90%	90%	90%
1.2 Legal, financial and property interests and assets of clients will be identified, secured and managed in a timely and prudent manner.	1.2.1	Percentage of critical incident reports in respect of children in continuing care reviewed and action initiated by the PGT within 60 calendar days of receipt	99%	95%	95%	95%
	1.2.2	Percentage of personalized case plans (covering property, effects, legal issues and living arrangements) that will be developed and implemented for new adult clients within six months of PGT appointment as Committee of Estate	87%	70%	75%	80%
1.3 Assets of client estates will be identified, secured and administered in a timely manner.	1.3.1	Percentage of adult client trust receipts processed within five business days	96%	90%	90%	90%
	1.3.2	Percentage of adult client disbursements processed within 15 business days	97%	95%	95%	95%
	1.3.3	Physical assets of new deceased estates secured within 15 calendar days of notification of death	88%	75%	75%	75%

# STRATEGIC GOALS, OBJECTIVES, STRATEGIES AND PERFORMANCE MEASURES

Goal # 1: PROPERTY AND FINANCIAL INTERESTS OF PGT CLIENTS WILL BE WELL MANAGED.						
Objectives		Performance Measures		Targets		
		08/09 Actual	09/10 Target	2010/11	2011/12	2012/13
1.4 Implement enhanced risk management processes.	1.4.1 Establish Enterprise Risk Management (ERM) Framework	NA	NA	ERM framework established and operational by March 31, 2011	TBD	TBD
	1.4.2 Secure and manage new and on-going client assets prudently.	NA	NA	A full business process review of Field Services completed with resulting changes in practice implemented by March 31, 2011.	TBD	TBD
1.5 Estate distributions will be made to heirs and beneficiaries.	1.5.1 Percentage of deceased estate funds distributed to heirs and beneficiaries rather than transferred to the BC Unclaimed Property Society	94%	85%	85%	85%	85%
1.6 Client investments will be handled prudently.	1.6.1 Investment returns for all three pooled funds match or exceed established benchmarks	3 of the 3 funds met or exceeded their benchmarks at March 31, 2009	Match or exceed established benchmarks	Match or exceed established benchmarks	Match or exceed established benchmarks	Match or exceed established benchmarks
	1.6.2 Percentage of investment plans subject to review completed within the next year	96%	95%	95%	95%	95%

**STRATEGIC GOALS, OBJECTIVES, STRATEGIES AND PERFORMANCE MEASURES**

**Goal # 2:**

**PERSONAL INTERESTS OF PGT CLIENTS WILL BE PROTECTED.**

Objectives	Performance Measures		Targets		
		08/09 Actual	09/10 Target	2010/11	2011/12 2012/13
2.1 The personal needs of child and youth clients will be protected.	2.1.1 For children and youth with assets in excess of \$50,000 where ongoing assistance with day to day maintenance has been approved, personalized expenditure plans will be developed and implemented within 20 calendar days of receiving all decision making information and then annually reviewed	96%	90%	90%	90%
2.2 The personal interests and health care needs of adult clients will be addressed.	2.2.1 Percentage of Committee of Person adult clients who are annually visited by PGT staff	99%	95%	95%	95%
	2.2.2 Percentage of major health care substitute decisions for adults made within three business days of all relevant information being received	99%	95%	95%	95%

# STRATEGIC GOALS, OBJECTIVES, STRATEGIES AND PERFORMANCE MEASURES

## Goal # 3:

STATUTORY PROTECTIVE AND MONITORING SERVICES WILL BE DELIVERED IN AN APPROPRIATE, TIMELY AND FAIR MANNER.

Objectives		Performance Measures		Targets			
			08/09 Actual	09/10 Target	2010/11	2011/12	2012/13
3.1 Settlement reviews of legal claims of children and youth will be carried out in a timely manner.	3.1.1	Percentage of proposed minors' settlements \$5,000 and over that are reviewed and the parties advised of the PGT position within 60 calendar days once all relevant information has been received	91%	90%	90%	90%	90%
	3.1.2	For minors' settlements under \$5,000, the average number of calendar days to review and advise of the PGT position regarding proposed settlements once all relevant information has been received	18 days	20 days	20 days	20 days	20 days
3.2 The PGT will act to protect the assets of adults at risk for abuse, neglect and self neglect.	3.2.1	Percentage of cases where, on confirming that the assets of an apparently abused or neglected adult unable to seek support and assistance are at significant risk and in need of immediate protection, protective steps are taken within one business day under s. 19 of the <i>Public Guardian and Trustee Act</i>	99%	90%	90%	90%	90%
	3.2.2	Average age of Private Committee accounts that have been submitted for passing and are awaiting PGT decision	4.7 months	6 months	6 months	5 months	4 Months

# STRATEGIC GOALS, OBJECTIVES, STRATEGIES AND PERFORMANCE MEASURES

## Goal # 4:

### THE PGT WILL CONTRIBUTE TO PUBLIC AWARENESS, POLICY DEVELOPMENT AND LAW REFORM INITIATIVES TO PROMOTE THE INTERESTS OF CLIENTS.

Objectives		Performance Measures		Targets			
			08/09 Actual	09/10 Target	2010/11	2011/12	2012/13
4.1 The PGT will make relevant, useful and affordable recommendations to government for law reform affecting clients.	4.1.1	Implement PGT statutory responsibilities under the <i>Wills, Estates and Succession Act</i> , 2009	NA	NA	Develop implementation plan by March 31, 2011	Implement new and revised PGT roles (subject to coming into force of new law)	Carry out evaluation within one year of coming into force of new law
	4.1.2	Implement PGT statutory responsibilities under the <i>Adult Guardianship and Planning Statutes Amendment Act</i> , 2007	NA	NA	Implement PGT's role under incapacity planning by March 31, 2011 (subject to coming into force of new law)	Implement PGT's role under court and statutory guardian-ship aspects by March 31, 2012 (subject to funding and coming into force of new law)	Carry out evaluation within one year of coming into force of new law
4.2 The PGT will promote an understanding of its role among clients, service partners, stakeholders and the public.	4.2.1	PGT role explained by PGT representatives at stakeholder and service partner conferences, events and other public education forums	63 presentations	50 presentations	50 presentations	50 presentations	50 presentations

# STRATEGIC GOALS, OBJECTIVES, STRATEGIES AND PERFORMANCE MEASURES

## Goal #5: THE PGT WILL DELIVER HIGH QUALITY CLIENT CENTRED SERVICES.

Objectives		Performance Measures		Targets			
			08/09 Actual	09/10 Target	2010/11	2011/12	2012/13
5.1	The PGT will meet client expectations for quality, equitable and accessible services.	5.1.1	Percentage of heirs and beneficiaries responding to survey who rated administration services for deceased estates as good or very good	85%	85%	85%	85%
		5.1.2	Percentage of stakeholders reporting satisfaction with PGT legal services (stakeholder group varies annually)	75%	75%	75%	75%
5.2	Mission critical information technology systems and processes will support PGT business activities.	5.2.1	Develop client financial management information system in phases	Business case prepared for replacement of trust accounting system	Survey market for new trust accounting system	Begin implementation of trust accounting system (subject to funding)	TBD

## **6. RELATIONSHIP TO PROVINCIAL GOVERNMENT STRATEGIC PLAN**

PGT duties and responsibilities are in alignment with goal three of the Province's Five Great Goals:

*Build the best system of support in Canada for persons with disabilities, special needs, children at risk and seniors.*

PGT clients comprise persons with developmental disabilities, special needs (including mental illness and persons living with acquired brain injuries), children at risk, and seniors, particularly those with dementia and other diseases of aging.

The PGT is committed to assisting adult clients to have the best quality of life they can and to act in accordance with their wishes where possible. To the extent permitted by the current law respecting court and statutory adult guardianship, the PGT encourages maximum self sufficiency for adult clients and strives for minimal intervention consistent with the need for protection. The PGT acts in the best interests of child and youth clients including those with private guardians as well as those for whom the PGT is guardian of estate.

In delivering services to clients, the PGT works cooperatively with a broad range of provincial organizations including ministries and agencies or officials with statutory authority.

In addition, the PGT is a member of the Children's Forum, and in that capacity and others, works with the Provincial Health Officer, the Chief Coroner, the Ombudsperson, MCFD, and the Representative for Children and Youth.

# SUMMARY FINANCIAL OUTLOOK

## 7. SUMMARY FINANCIAL OUTLOOK

### A. Operating Cost Projections for 2010/11 through 2012/13

Program	2010-2011		2011-2012		2012-2013	
	Operating Revenue	Operating Expenditure	Operating Revenue	Operating Expenditure	Operating Revenue	Operating Expenditure
<i>All amounts are quoted in thousands of dollars</i>						
<i>Trust and Estate Services</i> <sup>1</sup>						
Services to Adults	7,576	8,639	7,576	8,641	7,576	8,643
Estate and Personal Trust Services <sup>3</sup>	3,041	3,205	3,041	3,206	3,041	3,207
Child and Youth Services	1,797	1,910	1,797	1,911	1,797	1,909
<i>Public Services</i> <sup>2</sup>						
Services to Adults	498	3,361	498	3,363	498	3,364
Child and Youth Services	865	5,128	865	5,155	865	5,186
Estate and Personal Trust Services	-	93	-	93	-	93
Voted Funding						
		9,462		9,459		9,459
Revenue in excess of expenditure/ (Expenditure in excess of revenue)						
		903		867		834
Projected permanent FTEs		246		249		249

<sup>1</sup> Trust and Estate Services include Client Services and Estate Liaison in Services to Adults; Estate and Personal Trust Services and Trust Services in Child and Youth Services.

<sup>2</sup> Public Services include Adult Guardianship [Health Care Consent, Community Liaison, and Response to Abuse and Neglect], Assessment and Investigation and Private Committee Services in Services to Adults; guardianship to children in care, infant settlements and other legal reviews in Child and Youth Services and Public Inquiry in Estate and Personal Trust Services.

<sup>3</sup> Estate and Personal Trust Services includes a declining backlog of non fee generating accounts transferred from County Administrators.

# SUMMARY FINANCIAL OUTLOOK

## B. Special Account Summary

	Public Accounts	Delegated Budget	Service Delivery Plan		
	2008- 2009	2009- 2010	2010- 2011	2011- 2012	2012 - 2013
<b>Special Account equity beginning balance</b>	<b>\$20,501</b>	<b>\$22,243</b>	<b>\$23,265</b>	<b>\$24,168</b>	<b>\$25,035</b>
Total self generated and voted funding	21,911	21,945	20,462	20,459	20,459
Total Operating Expenditure (net)	20,169	20,923	19,559	19,592	19,625
<i>Excess of revenue over expenditure</i>	1,742	1,022	903	867	834
Capital expenditure	408	500	500	500	500
Adjustment for capitalization of assets	(408)	(500)	(500)	(500)	(500)
	0	0	0	0	0
<b>Special Account Equity Ending Balance</b>	<b>\$22,243</b>	<b>\$23,265</b>	<b>\$24,168</b>	<b>\$25,035</b>	<b>\$25,869</b>

**8. CONTACT INFORMATION**

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Toll free calling is available by dialing Service BC and asking to be transferred to the Public Guardian and Trustee.

Toll free	1.800.663.7867
Lower Mainland	604.660.2421
Victoria	250.387.6121
Elsewhere	800.663.7867

**For further information:**

Visit [www.trustee.bc.ca](http://www.trustee.bc.ca) or E-mail: [mail@trustee.bc.ca](mailto:mail@trustee.bc.ca)